WAIVER ONLINE INCIDENT TRACKING SYSTEM (W-OTIS)
QUICK REFERENCE GUIDE
FOR
SUPPORT COORDINATION AGENCIES

INTRODUCTION

W-OTIS is a secure internet website available to authorized users. It was developed by the Department of Health and Hospitals (DHH) and was implemented in April, 2003. Private and State agencies currently using the OTIS database include

When Critical Incident Report (CIR) information is entered into the DHH-OTIS Server, security of the information is ensured by a firewall of protective software.

The *W-OTIS Quick Reference Guide* provides the Support Coordination Agencies with concise, step-by-step instructions for entering Critical Incident information. A comprehensive W-OTIS User Manual is currently being developed which will include W-OTIS screen shots to accompany the steps.

The *W-OTIS Quick Reference Guide* is organized by W-OTIS characteristics and functions.

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USER PASSWORDS

- **Each user is required to have a unique username and password.**
- **Keep your username and password confidential.**
- **You may keep the assigned password or choose another password after using the assigned password at least once.**
- **You cannot use your three previous passwords when updating password.**
- **User will be locked out after three incorrect attempts to login.**
- **Only supervisors should contact the Regional W-OTIS administrator to address problems.**
- **Passwords expire in 180 days.**
- **New passwords must be between 6 and 14 characters and contain at least one number.**
- **To reset your password, logon with your current username and password. Click *Reset Password*. Enter your new password following the required parameters listed above, confirm your new password, and click on *Reset password*.**

ACCESSING W-OTIS

1. **From your internet browser (e.g. Internet Explorer), go to the OAAS Welcome page at www.oaas.dhh.louisiana.gov.**
2. **Click on the W-OTIS link located on the left menu bar to get to the W-OTIS Welcome page.**
3. **From the W-OTIS Welcome page, go to the bottom of the page and click on Click Here for W-OTIS Login. The "Department of Health and Hospitals Client Incident Tracking" page appears.**
4. **Enter your secure username and password. Click *Logon*. DO NOT select *Save this password in your password* list as this violates HIPAA requirements. The "Department of Health and Hospitals Client Incident Report" page appears.**

ENTERING INTIAL CIR INFORMATION

5. **Click on *New Incident*.**
6. **Click on *Save New Incident*.**
7. **Write the Incident ID Number on the CIR form.**
8. **Begin entering information from the CIR (after completing Steps 5 and 6, this may be done in any order).**
9. **Enter the first few letters of the *Reporter's* last name in the *Contact Last Name* box. Click *Find*. A list of Contacts whose last names contain those letters will appear in the box.**

10. **Click on the correct name as documented in the CIR to highlight it, then click *Add*. The Reporter will move across to the *Contacts* box. (Skip to Step 14 if the Reporter's name is in the list).**

NOTE: ALWAYS CLICK ON *SAVE CHANGES* BEFORE MOVING FROM PAGE TO PAGE.

11. **Click on *Save Changes*. If the Reporter's name is not in the drop down list, create a new contact by clicking on *New Contact*. The "DHH Client Contacts" page appears.**

12. **Fill in the appropriate information (as much as you know or documented). Click on *Save New Contact.* Then click Return.**

13. **Repeat Steps 9 and 10.**

14. **Click on *Edit*. Click on the drop down box arrow under *Type*. Click on *Reporter*.**

15. **Click on the drop down box arrow under *Relationship*. Click on the appropriate relationship as documented in CIR. Click *Update* and the *Reporter* and appropriate *Relationship* appear in the *Contacts* box.**

16. **In the *Events* box, enter the date and time the incident occurred. (Enter am and pm, NOT a.m. or p.m.). Click *Add*.**

17. **Continue entering the *Events* dates and times as applicable to the incident.**

18. **Enter your Support Coordination Agency *Site* number and the participant's *Case Number*. Click *Find*. The participant's name, date of birth, gender, and Social Security Number appear in the box.**

19. **Click on the participant's name to highlight it, then click *Add*. The participant's name, date of birth, Social Security Number, and Waiver type appear in the *Participant* box.**

21. **Verify your *S.C. Agency* in the drop down box. If you supervise in different regions, select the applicable S.C. Agency.**

22. **Select the *Provider* associated with this incident from the drop down box.**

23. **Select a Support Coordinator from the *S.C. assigned* drop down box.**

24. **Under *Incident Categories* click on the category or categories documented in the CIR to highlight it. Then click on the arrow (greater than sign) to move it into the adjacent box. If you make a mistake, click on the arrow (less than sign) to move it back into the category list.**

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25. Click on "Save Changes." In the *Participant* box, click on *Open*. The "DHH Participant" page appears. Verify that the participant's information is correct. If not, correct in CMIS and make a note in the *Description* on the "Incident Case Notes" page of the changes you made.

26. In the drop down box for *Transition Type*, click on the appropriate item, if applicable. If there is no *Transition Type* associated with the participant, leave it blank.

27. Click on the drop down box arrow in the *Disabilities* box. Highlight the appropriate disability or disabilities and then click *Add*.

28. Click on the drop down box arrow in the *Events* box. Click on the appropriate *Event(s)* and enter the date(s). Then click *Add*.

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29. Click on *Save Changes*. Click on Return.

30. Click on the blue hyperlink *Case Notes* at the top of the "DHH Client Incident Report" page to go to the "Incident Case Notes" page.

31. The word *Description* should be highlighted blue and appear in the right-hand box. Move your cursor to the large text box and begin entering the *Description* ending with your name, title, date, and time. Click on *Save Changes*. If you have completed all entry items, exit W-OTIS by clicking on the "X" in the upper right corner.

ENTERING SUBSEQUENT FOLLOW-UP INFORMATION

32. As you receive follow-up information for the incident, enter into W-OTIS. Access the DHH "Client Incident Report" page. Enter the *Incident ID Number* you documented on the CIR form by entering it into the blank box next to *Incident ID*. Click *Go* and your incident appears.

33. Click on *Case Notes* to go to the "Incident Case Notes" page. Click on *Follow-up* to highlight blue. Click on the arrow (greater than sign) to bring it over to the adjacent box. Enter the *Follow-up* information and end with your name, title, date, and time. Click on *Save Changes*. Exit W-OTIS by clicking on the "X" in the upper right hand corner.

ACCESSING W-OTIS LIST CASES URL

34. The URL to access the W-OTIS List Cases page (http://dhhincidenttracking.ddh.la.gov/IncidentTracking/ListCasesSC.aspx) from your internet browser is located on the OAAS Welcome page. Log on with your username and password.

35. **On the "List Cases" site, you have the option to pull up cases in a specific date range, by participant, and/or by SC assigned.**

36. **The *SC Follow-up Due Date* column in "List Cases" provides a useful tickler system to manage your OTIS follow-up due dates.**

PARTICIPANT INCIDENT SUMMARY

37. **Check the "List Cases" site routinely to determine when cases are closed by the Waiver Office, as this is your signal that the Participant Incident Summary is ready to print from the "Incident Case Notes" page. The column in "List Cases" titled "Report Status" identifies whether the case is complete or incomplete.**

38. **To access the Participant Incident Summary, pull up the incident report by entering the corresponding *Incident ID* Number and click *Go.***

39. **Click on *Case Notes* to get to the "Incident Case Notes" page. Click on *Summary*. Click on the *Print* button.**

W-OTIS TECHNICAL SUPPORT

If you encounter problems with W-OTIS, communicate this problem to your Supervisor. If the Supervisor requires assistance, contact your Regional Office.